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Tax Relief for Senior Renters & Homeowners

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Senior Fact Sheet

Aging and Long-Term Care Resources

The resources below will help put you in touch with information about state and area agencies, tribal organizations and private organizations serving the elderly in your community.

- **Area Agency on Aging**
1-800-510-2020

Information and access to your community's comprehensive network of community-based long-term care services.

- **HICAP – Health Insurance Counseling and Advocacy Program**
1-800-434-0222

Provides assistance on questions related to Medicare, Medicare HMOs, Medicare supplements and long-term care insurance.

- **Medicare Office**
1-800-633-4227

- **California Department of Aging**
1-916-322-5290

1600 K Street
Sacramento, CA 95814

- **California Commission on Aging**
1-916-322-5630

California Senior Legislature
Triple-A Council of California
1020 9th Street, Room 260
Sacramento, CA 95814

- **AARP State Office**
1-916-446-AARP/2277

980 9th Street, Suite 700
Sacramento, CA 95814

- **Senior Legal Hotline**
www.seniorlegalhotline.org

Other important numbers:

- **Area Agency on Aging**
San Mateo County (650) 573-2700
San Francisco County (415) 864-6051
- **Adult Protective Services**
San Mateo County (800) 675-8437
San Francisco County (415) 557-5230
- **In-Home Support Services**
San Mateo County (650) 573-2700
San Francisco County (415) 981-4477
- **RSVP**
San Mateo County (650) 696-4195
San Francisco County (415) 731-3335
- **Websites**
www.medicare.gov
www.nih.gov
www.aging.state.ca.us

Property tax and renter assistance programs for older Californians. Each program has its own eligibility requirements and filing periods.

1. Homeowners' Property Tax Exemption

Who is eligible:

You must own and occupy your home in California as your principal residence as of January 1 of the year for which you are filing. There are no age or income requirements. You can receive the Homeowners' Property Tax Exemption and Homeowner Assistance during the same year.

How much is exempted:

Contact your county assessor to calculate your exemption. Tax reduction is usually about \$70.

When and where to file:

File with your County assessor's office by February 15 for the prior year. (Your exemption will be less if you file after February 15.) Claim forms and preparation and filing assistance are available from that office. There is no need to re-file for this exemption (reduction) each year, provided you continue to own and occupy the same dwelling on January 1. You can find your county assessor by looking in the telephone book white pages listing under County Government offices.

2. Homeowner & Renter Assistance

This program provides a once-a-year payment from the State of California to

qualified individuals based on part of the property taxes assessed and paid on your home. Renters are qualified based on the part of property taxes they paid indirectly when paying rent. For the 2001 claim year, eligible homeowners may claim up to 96% of a portion of the property taxes they paid in 2000. You may be eligible to file a claim for the previous year if you are a US citizen, designated alien or qualified alien when you file your claim and if you met the following criteria on December 31 of the year for which you are filing:

- You were 62 years of age or older, blind, or disabled,
- You owned and lived in your own home, or if a renter, you paid \$50 or more per month in rent on that residence and lived in a qualified rented residence in California, and
- You had a total income of \$35,251 or less (this amount is for 2001 income, and is subject to change each year).

You may be eligible:

- Even though you received SSI or other public assistance last year.
- Even though you claim the Veterans' or Homeowners' Tax Exemption.
- If you own a mobilehome located on land owned or rented by you. (Mobilehome owners who must pay license fees may claim either Homeowner Assistance or Renter Assistance, but not both.)

How much help will you receive

The size of your refund depends upon your household income.

When and where to file:

To receive an application, call the Franchise Tax Board toll-free, 1-800-338-0505, and ask for Form 9000 (homeowners) or Form 9000R (renters). TTY/TTD service for the hearing-impaired is 1-800-822-6268.

Note: Only one homeowner or renter from each household is entitled to the assistance each year. When two or more individuals of a household meet the qualifications for filing a claim as the homeowner, they must decide which one will file the claim.

3. Property Tax Postponement Law

Allows persons 62 years of age or older, disabled or blind, with household incomes less than \$24,000 to postpone all or part of the property taxes on their homes. If you filed in prior years when the income limit was \$34,000, you may continue to file under that figure. You must file for each year for which you want postponement.

For claim forms, requests for extensions and dollar limitations, write or call the State Controller, Post Office Box 953, Sacramento, CA 95812-0953, or call 1-800-952-5661.

Where to find help

- **Homeowners' Property Tax Exemption:** Contact your County Assessor. Find the Assessor by looking in the telephone book white pages listing under County Government offices or www.boe.ca.gov/proptaxes/assessors.htm
- **Homeowners and Renters Assistance:** Call the California Franchise Tax Board toll free at 1-800-338-0505, or www.ftb.ca.gov
- **Property Tax Postponement:** For claim forms, requests for extensions and dollar limitations, write or call the State Controller, Post Office Box 953, Sacramento, CA 95812-0953, or call 1-800-952-5661, or www.sco.ca.gov/col/taxinfo/index.htm